Care Coordination (CC) Standardized Episodes of Care (SEOC) Software Version 1.17.0 Database User Guide



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Revision History

NOTE: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

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Date	Revision	Description	Author
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Artifact Rationale

Per the Veteran-focused Integrated Process (VIP) Guide, the User's Guide is required to be completed prior to Critical Decision Point #2 (CD2), with the expectation that it will be updated as needed. A User Guide is a technical communication document intended to give assistance to people using a particular system, such as VistA end users. It is usually written by a technical writer, although it can also be written by programmers, product or project managers, or other technical staff. Most user guides contain both a written guide and the associated images. In the

case of computer applications, it is usual to include screenshots of the human-machine interfaces, and hardware manuals often include clear, simplified diagrams. The language used is matched to the intended audience, with jargon kept to a minimum or explained thoroughly. The User Guide is a mandatory, build-level document, and should be updated to reflect the contents of the most recently deployed build. The sections documented herein are required if applicable to your product.

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1. Introduction

The Care Coordination (CC) Standardized Episodes of Care (SEOC) is a reference database for managing care bundles for use by Veterans Information Systems and Technology Architecture (VistA) and other Department of Veterans Affairs (VA) systems. Services are grouped together within the SEOC system into bundles so that clinicians can add these bundles to patients consult records in a standardized fashion, reducing the amount of time spent manually entering consult instructions, and providing uniformity among the patient records and across facilities for how patient care is prescribed for similar complaints.

These bundles group together one or more services that are preselected for different specialties to be added to the consult records. In addition, the clinician is provided with information regarding prescribing rules and preauthorization requirements, so they can make the most informed decisions regarding patient care.

Additionally, SEOC data will be accessible outside of the VistA/Computerized Patient Record System (CPRS) system so that users of downstream applications will be accessing the centralized data, and SEOC descriptions, reducing the chances of disconnects.

1.1. Purpose

The purpose of this document is to provide instruction for utilizing the SEOC application to standardize and streamline consult management for Community Care.

1.2. Document Orientation

The Care Coordination (CC) Standardized Episodes of Care (SEOC) v1.17.0 Database User Guide will provide explanations of each screen and of all user interface options within the context of an easy to understand demonstration data scenario.

This document is also designed to provide the user with screen-by-screen "how to" information on the usage of CC SEOC.

1.2.1. Organization of the Manual

Section 1: Introduction

The Introduction section provides the purpose of this manual, an overview of the SEOC software, an overview of the software used, project references, contact information for the user to seek additional information, and an acronyms and abbreviations list for this manual.

Section 2: System Summary

The System Summary section provides a graphical representation of the equipment, communication, and networks used by the system, user access levels, how the software will be accessed, and contingencies and alternative modes of operation.

Section 3: Getting Started

Information for the Getting Started section provides a general walk-through of the system from initiation through exit, enabling the user to understand the sequence and flow of the system.

Section 4: Using the Software

This section gives the user the "how to" information to use SEOC, including many step-by-step procedures.

Section 5: Troubleshooting

This section provides troubleshooting for the SEOC user.

Section 6: Acronyms and Abbreviations

This section provides a list of acronyms and abbreviations found in this document.

1.2.2. Assumptions

This guide was written with the following assumed experience/skills of the audience:

• User has Google Chrome and/or Internet Explorer 11 installed on their machine.

NOTE: Please note that SEOC is not fully 508 compliant in Microsoft Edge, so the VA will continue to support 508 in only Google Chrome and Internet Explorer 11.

- The SEOC user has basic knowledge of the SEOC system (such as the use of commands, menu options, and navigation tools).
- The SEOC user has been provided the appropriate active roles, menus, and security keys required for the SEOC User Interface (UI).
- The SEOC user is using SEOC to perform their daily consult creation workflow and perform the required SEOC functions.
- The SEOC user has validated access to the SEOC UI.
- The SEOC user has been provided training on the SEOC UI and has reviewed the User Guide.
- SEOC Content Authors: The SEOC Content Authors are responsible for creating and update the content within the SEOC repository using the SEOC UI. These users are required to VA access rights and privileges and will sign on to the SEOC application using their Single Sign-On Integration (SSOI) credentials (typically their Personal Identification Verification (PIV) and access code).
- CPRS Clinicians that are responsible for documenting patient consult records. These clinicians utilize the SEOC content as part of their daily consult creation workflow such that they will add a SEOC bundle to the patient consult record which will provide for a standardized documentation and care plan approach across the VA for these consults.

1.2.3. Coordination

One Consult - Consult Toolbox 1.9.02 and above and the HealthShare Referral Manager (HSRM) depend on the availability of the SEOC System. Consult Toolbox 1.9.02 requires active SEOCs whereas HSRM requires active and discontinued SEOCs. Coordination between the One Consult – Consult Toolbox, HSRM, and SEOC team is necessary with any updates to SEOC.

1.2.4. Disclaimers

1.2.4.1. Software Disclaimer

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely provided that any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.2.4.2. Documentation Disclaimer

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.

1.2.5. Documentation Conventions

This manual uses several methods to highlight different aspects of the material.

Table 1. Documentation Symbols and Descriptions

Symbol	Description	
A	CAUTION: Used to caution the reader to take special notice of critical information.	

NOTE: Notes are used to inform the reader of general information including references to additional reading material.

1.2.6. References and Resources

Readers who wish to learn more about CPRS and CC SEOC should consult the <u>VA Software</u> Document Library.

1.3. National Service Desk and Organizational Contacts

For issues related to the CC SEOC that cannot be resolved by this manual or the site administrator, please contact the National Service Desk at 855-NSD-HELP (673-4357).

2. System Summary

There was an immediate need to provide clinicians the ability to quickly and consistently add care bundles to a patient's consult record within VistA. SEOC provides this feature for a higher level of uniformity in patient care, easier access to appropriate services, based on initial diagnoses, and the ability to better control care costs. SEOC allows clinicians to enhance the coordination of care for the Veteran.

The system contains SEOCs, or care bundles, that clinicians or other designated individuals can assign to VA patients. These bundles allow for the consistent use of procedures when certain conditions are diagnosed. This consistency allows the VA to effectively manage patient care and provides easier traceability.

2.1. System Configuration

The SEOC System is designed to be a simple reference database with a supporting SEOC Application Program Interface (API) and UI layer. The SEOC system comprises three application tiers as shown below.

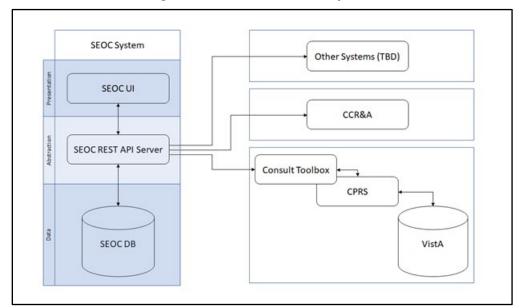


Figure 1: Overview of SEOC System

The first tier is the Data Tier. This tier contains SEOC data. SEOC uses Microsoft Structured Query Language (SQL) Server is the database. SEOC data consists of reference data, such as SEOC name, associated procedures, associated Current Procedural Terminology (CPT) codes, procedure durations, etc. Additionally, user role information is maintained within the tables, but no passwords or other credentials are stored. No Protected Health Information (PHI) or Personally Identifiable Information (PII) is stored in the database. SEOC data is associated with patient data in the VistA consult record.

The second tier is the Abstraction Tier. This tier acts as the data broker for the SEOC system. It is a Representational State Transfer (REST) API, built as a microservice hosted on container infrastructure (Docker Container). The API itself is built on the Spring Model-View-Controller (MVC) framework. The API receives web API calls that are forwarded to the database

appropriately. Consuming applications are able to query the SEOC system through the SEOC REST API but will not be able to perform updated operations. The SEOC UI uses certificates to authenticate with the SEOC REST API to allow data modification within the SEOC system by authenticated users. Users are authenticated using SSOI. Additionally, a VistA/MUMPS patch is created to insert the SEOC associations into File # 123.

The third and final tier is the Presentation Tier. This tier consists of the SEOC UI, which provides a user interface for approved, authenticated users to maintain the SEOC collection. This application is a web application built as a microservice hosted on container infrastructure (Docker Container). The UI is built using the React.js JavaScript framework for web applications.

2.2. Data Flows

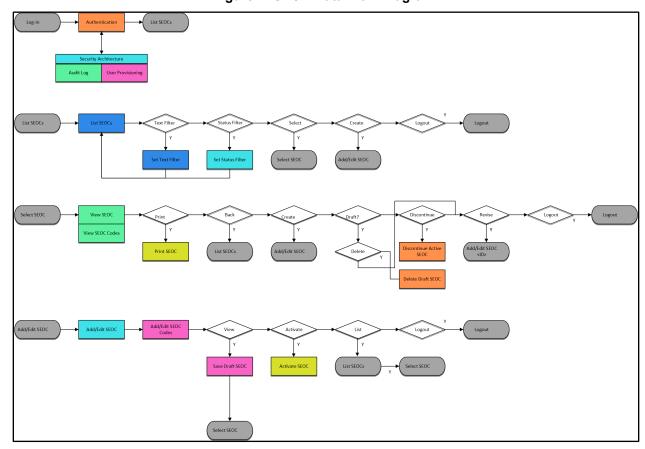


Figure 2: SEOC Data Flow Diagram

2.3. User Access Levels

SEOC user profiles comprise of the following "types of users":

- SEOC Content Authors: The SEOC Content Authors are responsible for creating and update the content within the SEOC repository using the SEOC UI. These users are required to VA access rights and privileges and will sign on to the SEOC application using their SSOI credentials (typically their PIV and access code).
- CPRS Clinicians that are responsible for documenting patient consult records. These clinicians utilize the SEOC content as part of their daily consult creation workflow such that they will add a SEOC bundle to the patient consult record which will provide for a standardized documentation and care plan approach across the VA for these consults.
- SEOC data is also accessible to other external consumers in the future (in addition to CPRS users). The SEOC API is a RESTFul API that other (to be determined) users will have access to use.

2.4. Continuity of Operation

The SEOC system is maintained by Enterprise Operations (EO). The continuity of operations is managed by EO.

3. Getting Started

This section provides a general walkthrough of CC SEOC from initiation through exit.

3.1. Logging On

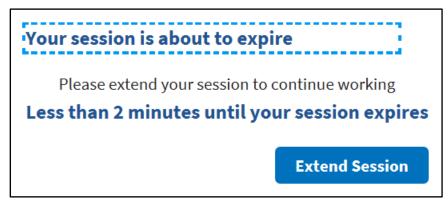
CC SEOC is accessed using the VA SSOi log in using the following URL: https://seoc.va.gov/



Figure 3: VA Single Sign-On for SEOC

NOTE: After 15 minutes of inactivity the system will automatically log you out. After 13 minutes of inactivity the system will prompt you to extend your session.

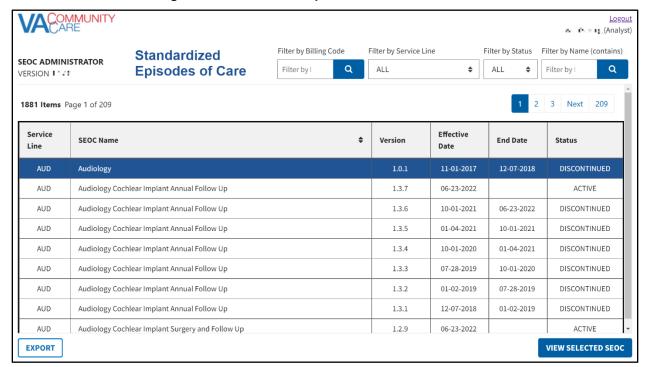
Figure 4: 2 Minutes Until Session Expires Warning



3.2. System Menu

The Standardized Episodes of Care dashboard offers several features: Filter by Billing Code, Filter by Service Line, Filter by Status, Filter by Name, and View Selected SEOC. The home page also displays the user name and role at the top right of the page.

Figure 5: Standardized Episodes of Care Dashboard





CAUTION: To view the list of SEOCs using a keyboard interface with assistive technology, you will need to use the "Tab" key to navigate through the list..

Standardized Episodes of Care table fields:

- Service Line A broad category of care for the services and procedures included which is intended to be used to group and filter SEOCs for easier accessibility. A standardized three-letter abbreviation of the service line is included at the beginning of the SEOC ID.
- **SEOC Name** A unique title that categorizes a SEOC by specialty/subspecialty or area of clinical practice.
- **Version** The version number of the SEOC. The version number is formatted A.B.C where the first digit will be 1, the second digit is the number of published SEOCs in the same Category of Care when a new SEOC is activated, and the third digit is a serialized revision number.
- Effective Date The date the SEOC status was made from In-Progress to Active.
- End Date The date the SEOC status was discontinued.
- **Status** –The SEOC statuses are as follows:
 - o **Active**: When a SEOC is Active, it will be available for all end users (e.g. API users, scheduling, payment, and auditing purposes).
 - Date Hold: When the SEOC status is Date Hold, it is pending and set for activation on a designated future date. This status is only available for SEOC Administrative users for editing purposes.
 - O **Discontinued**: When a SEOC is Discontinued, read-only users will not have access to the discontinued SEOC in the SEOC Database or the scheduling interface. However, the discontinued version will still be available for payment and auditing purposes. Discontinued SEOCs will remain in the SEOC database for up to six (6) years in the central repository.
 - → In-Progress: The SEOC is available for editing purposes by the Administrators and Authors prior to activation. These SEOCs will not be available via SEOC Database API.

3.3. Changing User ID and Password

If you need to change your user password, you will need to contact your local PIV office.

3.4. Exit System

If you are finished working, log out of VA Single Sign-On and close any secure sessions that may still be open by selecting the **Logout** button.

4. Using the Software

The CC SEOC provides user functionality for the following items:

- Viewing SEOCs
 - View a Selected SEOC
 - o Search for a SEOC by Name
 - Sort SEOCs Alphabetically by Name
 - o Filter SEOCs by Status
 - o Print a SEOC
 - o Track Version Changes

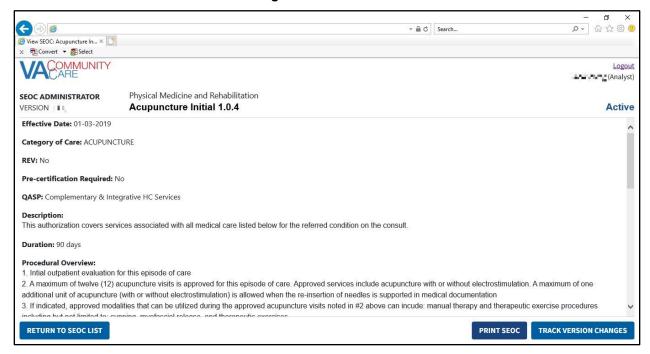
4.1. View SEOCs

4.1.1. View a Selected SEOC

To view a SEOC from the SEOC list, follow the steps listed below:

- 1. From the SEOC home page, select the SEOC you would like to view.
- 2. Select View Selected SEOC. The View SEOC page displays.

Figure 6: View SEOC



4.1.2. View Filtered SEOCs

4.1.2.1. Filter SEOCs by Billing Code

To filter the list of SEOCs by billing code, follow the steps listed below:

NOTE: Those with a Viewer role are unable to Filter SEOCs by Billing Code.

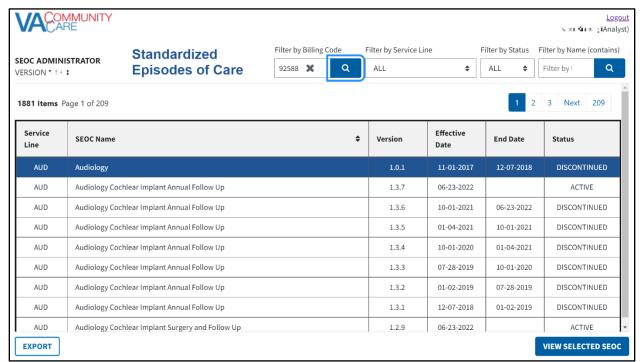
1. From the SEOC Admin home page, enter the billing code in the **Filter by Billing Code** field.

Figure 7: Filter by Billing Code Field



2. Select the **Search** button. The SEOC list refreshes to display the SEOCs list filtered by the billing code type.

Figure 8: Filter by Billing Code Search Results

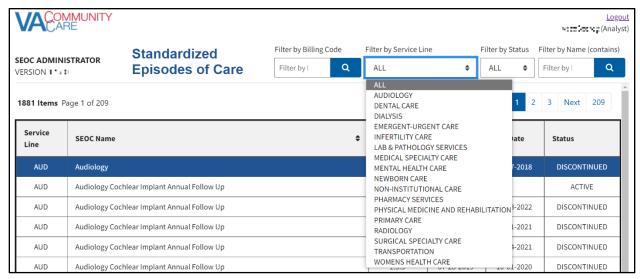


4.1.2.2. Filter SEOCs by Service Line

To filter the list of SEOCs by Service Line, follow the steps listed below:

1. From the SEOC Admin home page, select Filter by Service Line menu.

Figure 9: Filter by Service Line Menu Options



2. From the list of options, select one of the service line types to filter by. The SEOC list refreshes to display the SEOCs list filtered by the selected service line type.

4.1.2.3. Filter SEOCs by Status

To filter the list of SEOCs by status, follow the steps listed below:

1. From the SEOC home page, select **Filter By Status** menu.

Figure 10: Filter by Status Menu Options



2. From the list of options select to filter by: All, Active, Date Hold, Discontinued, or In-Progress. The SEOC list refreshes to display the status filtered by.

4.1.2.4. Filter SEOCs by Name

To filter the SEOCs by name, follow the steps listed below:

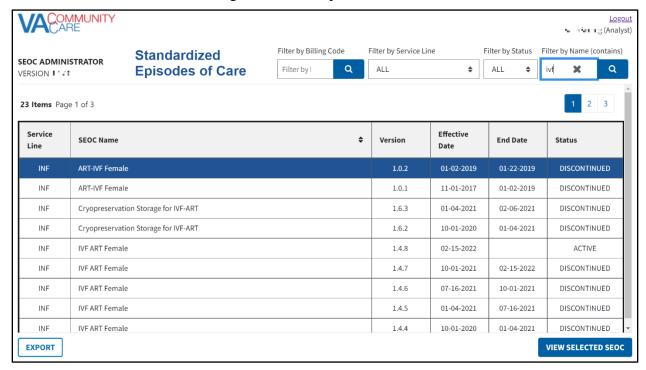
1. From the SEOC home page, enter the name of the SEOC in the **Filter by Name** (contains) field.

Figure 11: Filter by Name Field



2. Select the Search button. The Filter by Name Results display.

Figure 12: Filter by Name Results



4.1.2.5. Sort SEOCs Alphabetically by Name

To sort the list of SEOCs alphabetically by name, follow the steps listed below:

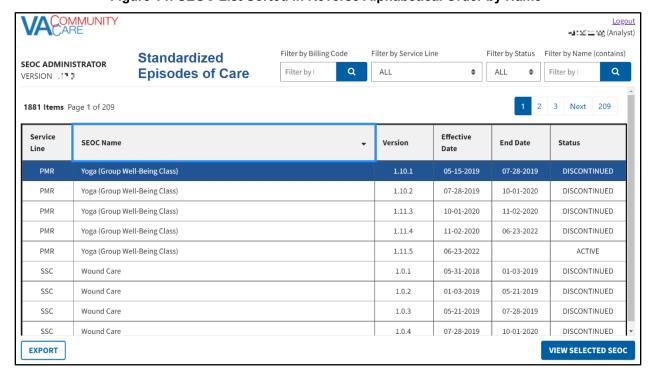
1. From the SEOC home page, select the **SEOC Name Column Heading**. This will sort the list of **SEOCs** in alphabetical order by name.

OMMUNITY Logout (Analyst) Filter by Billing Code Filter by Service Line Filter by Status Filter by Name (contains) **Standardized** SEOC ADMINISTRATOR Filter by I **Episodes of Care** VERSION I T. **1881 Items** Page 1 of 209 3 Next 209 Effective Service SEOC Name Version **End Date** Line Date Abortion Services VCA WHC 09-16-2022 ACTIVE PMR Acupuncture 1.0.1 11-01-2017 11-01-2017 DISCONTINUED 11-01-2017 12-07-2018 DISCONTINUED PMR Acupuncture 1.0.2 02-15-2022 DISCONTINUED Acupuncture Chronic Care Management 1.1.8 10-01-2021 Acupuncture Chronic Care Management 1.1.9 02-15-2022 PMR Acupuncture Continuation of Initial Care 1.11.9 10-01-2021 02-15-2022 DISCONTINUED PMR Acupuncture Continuation of Initial Care 1.11.10 02-15-2022 ACTIVE Acupuncture Initial 1.0.3 12-07-2018 01-03-2019 DISCONTINUED PMR Acupuncture Initial 1.0.4 01-03-2019 05-17-2019 DISCONTINUED

Figure 13: SEOC List Sorted in Alphabetical Order by Name

2. To sort the list of **SEOCs** in reverse alphabetical order, select the **SEOC Name Column Heading** again.

Figure 14: SEOC List Sorted in Reverse Alphabetical Order by Name



EXPORT

VIEW SELECTED SEOC

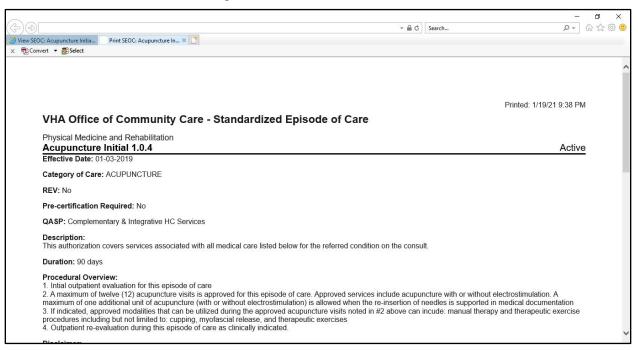
NOTE: To return to the default sort order, either refresh the page or select the logo in the upper-right-hand corner of the page.

4.1.3. Print a SEOC

To print a SEOC, follow the steps listed below:

- 1. From the SEOC home page, select the SEOC you would like to print.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select **Print SEOC**. The printed SEOC will display in another window. Print or save using local browser capabilities.

Figure 15: Printed SEOC Window



4.1.4. Track Version Changes

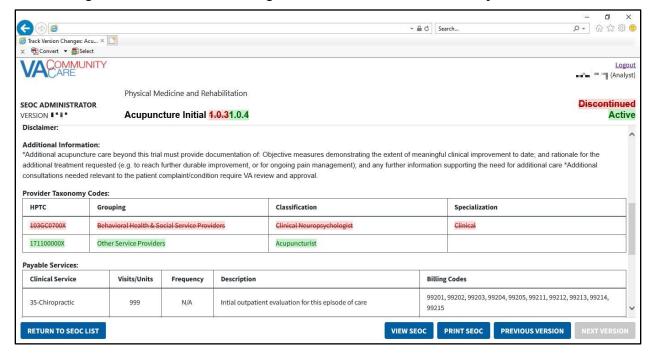
To track the version changes of a SEOC, follow the steps listed below:

- 1. From the SEOC home page, select a **SEOC** with a previous version.
- 2. Select View Selected SEOC, the View SEOC page displays.
- 3. Select the **Track Version Changes** button when it becomes active. The **Track Version Changes** page will display.

ø **₽-** 份☆戀 🧐 → 🗎 🖒 Search... OMMUNITY Logout (Analyst) Physical Medicine and Rehabilitation Discontinued SEOC ADMINISTRATOR VERSION . Acupuncture Initial 4.0.31.0.4 Active Effective Date: 12-07-201801-03-2019 End Date: 01-03-2019 Category of Care: ACUPUNCTURE Pre-certification Required: No QASP: Complementary & Integrative HC Services This authorization covers services associated with all medical care listed below for the referred condition on the consult Duration: 90 days Procedural Overview: 1. Intial outpatient evaluation for this episode of care 2. A maximum of twelve (12) acupuncture visits is approved for this episode of care. Approved services include acupuncture with or without electrostimulation. A maximum of one RETURN TO SEOC LIST VIEW SEOC PRINT SEOC PREVIOUS VERSION

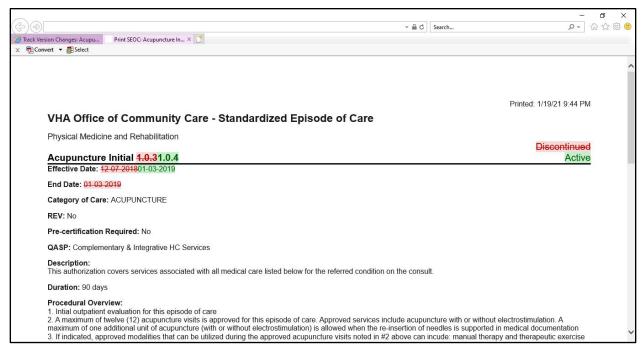
Figure 16: Track Version Changes Page

Figure 17: Track Version Changes: Additional Information and Payable Services



- 4. Select the **Previous Version** button. The changes for the previous version will be shown. If the previous version is the first version of this **SEOC**, no changes will be displayed.
- 5. Select the **Next Version** button. The changes for the next version will be shown.
- 6. Select the **Print SEOC** button. The **Print SEOC** page will display with the current changes.

Figure 18: Print SEOC from Track Version Changes Page



NOTE: By default, Internet Explorer 11 will not print the red and green background colors. In order to print the red and green background colors, check the Print Background Colors and Images box in the Page Setup dialog from the Print menu.

5. Troubleshooting

Users may encounter the following errors while using the SEOC UI.

Table 2: SEOC Error Codes with Descriptions

Error Code	Description
204	No Content Found
401	Unauthorized
403	Forbidden
404	Not Found

6. Acronyms and Abbreviations

Acronym	Definition
API	Application Program Interface
СС	Care Coordination
CCAD	Community Care Agile Development
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
HSRM	HealthShare Referral Manager
EO	Enterprise Operations
JSON	JavaScript Object Notification
MVC	Model-View-Controller
NSD	National Service Desk
OIT	Office of Information and Technology
PHI	Protected Health Information
PII	Personally Identifiable Information
PIV	Personal Identification Verification
REST	Representational State Transfer
SEOC	Standardized Episode of Care
SQL	Structured Query Language
SSOI	Single Sign-On Integration
UI	User Interface
VA	Department of Veterans Affairs
VDL	VA Software Document Library
VIP	Veteran-focused Integrated Process
VistA	Veterans Health Information Systems and Technology Architecture